

Closing the Digital Divide to Create Economic Opportunity

THE PUBLIC SERVICE COMMISSION OF SOUTH CAROLINA

MARCH 28, 2022

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Charter
COMMUNICATIONS

AGENDA



OUR NATIONAL IMPACT



Nearly 450 Million
IP Devices Connected to Our Network



53 Million
Homes Passed in 41 States



32 Million
Customer Relationships



29 Million
Broadband Internet Customers



16 Million
Video Subscribers

10 Million
Voice Subscribers

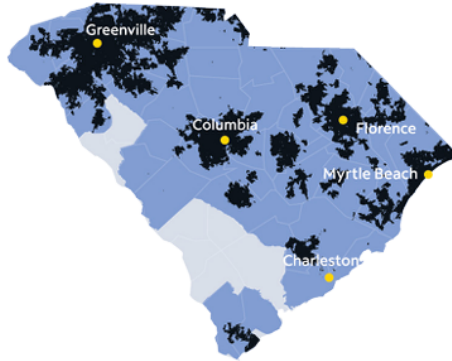
2.7 Million
Mobile Lines

over **750,000**
Miles of Network Infrastructure

CHARTER IN SOUTH CAROLINA

Our Impact in **South Carolina**

Charter | **Spectrum**
COMMUNICATIONS



- ▶ **954,000**
customers served
- ▶ **3,165**
employees
- ▶ **\$110 million**
paid in taxes & fees in 2021*
- ▶ **\$243 million**
2021 capital investment*

SERVING SOUTH CAROLINA

Charter's insourced, U.S.-based workforce includes **3,165 people in South Carolina.**

Our largest employment centers are housed in **West Columbia, Simpsonville, and Greer.**

We serve **153 communities** across the state.

EXPANDING BROADBAND ACCESS

In 2021 alone, Charter extended its network to reach more than 1.1 million additional homes and small businesses across the country, about 30% in rural areas.

In 2021, Charter extended its network to reach an additional **44,000 homes and small businesses in South Carolina.**

*All data as of December 31, 2021 unless otherwise noted | *January 1, 2021 – December 31, 2021*

[Source: Charter Policy Home - South Carolina State Fact Sheet](#)

[Source: https://policy.charter.com/charter-2022-state-fact-sheet-south-carolina](https://policy.charter.com/charter-2022-state-fact-sheet-south-carolina)

SPECTRUM: BEST PROVIDER IN RURAL AREAS



**Best Internet Service
Provider for Rural Areas**
Spectrum Internet

**US News & World Report
Best Rural Internet
Providers Rating**

- #1 [Spectrum Internet](#)
- #2 [HughesNet Internet](#)
- #2 [Frontier Internet](#)
- #2 [CenturyLink Internet](#)
- #5 [Viasat Internet](#)

#1

RURAL INTERNET SERVICE PROVIDER – AND WE'RE JUST GETTING STARTED

Charter | **Spectrum**
COMMUNICATIONS

Broadband and the Digital Divide

Charter
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THE DIGITAL DIVIDE

BROADBAND ACCESS CHALLENGES

The **FCC's 14th Broadband Deployment Report** released in January 2021 estimated that there are **14.5 Million** Americans without access to broadband.

– *Approximately **451,000** of the FCC's estimated Americans without access to broadband live in **South Carolina**.*

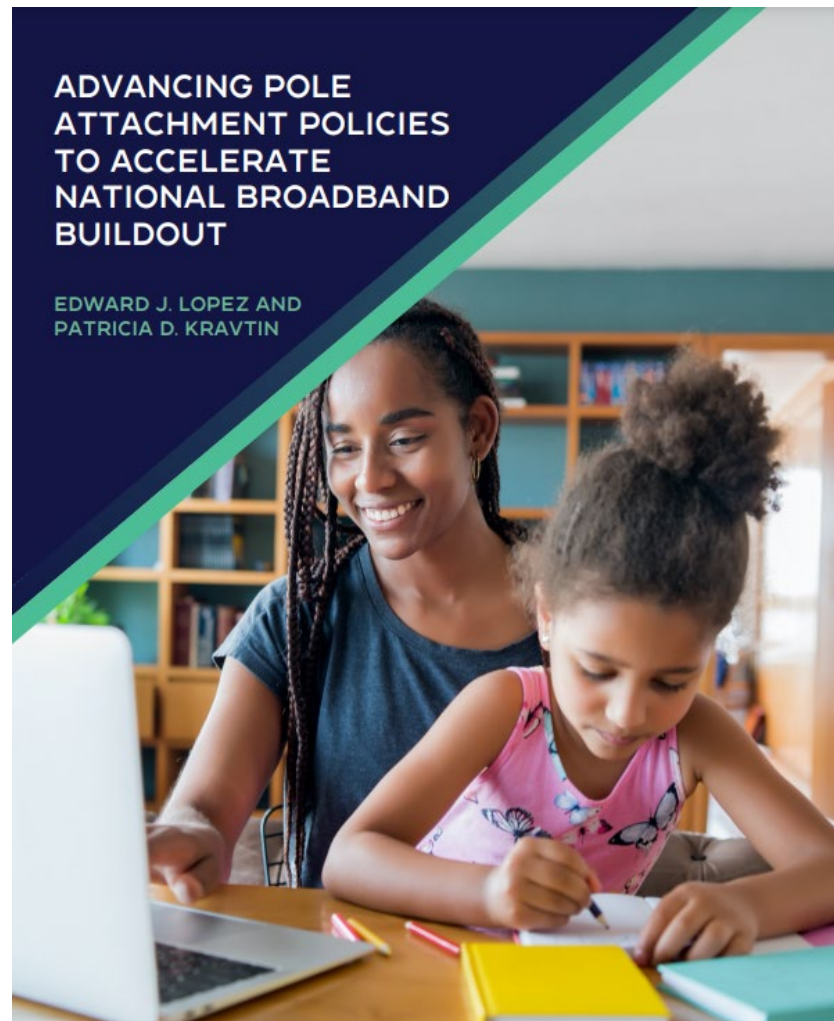
[Source: Fourteenth Broadband Deployment Report | Federal Communications Commission \(fcc.gov\)](#)

CLOSING THE DIGITAL DIVIDE

Unlocking the Gateway to Economic Opportunity

- Expanding Broadband Internet service to the **451,000** South Carolinians that lack access is estimated to generate between **\$3.12billion - \$8.82 billion**, annually.
- Every month that the expansion of high-speed broadband Internet service to unserved areas is delayed costs South Carolinians between **\$10.23M - \$52.16 M** in economic and social costs, **every month deployment is delayed.**
- The Federal Communications Commission allocated over **\$121 Million** to Internet Service Providers to help close South Carolina's broadband connectivity divide under the **Rural Digital Opportunity Fund (RDOF)**.
- South Carolina has the opportunity to invest additional one-time, federal funds to secure the economic opportunities that closing the digital divide can yield.

Source: <https://connectthefuture.com/wp-content/uploads/2021/11/Advancing-Pole-Attachment-Policies-To-Accelerate-National-Broadband-Buildout-National-Report.pdf>



EXPANDING AFFORDABILITY ACCESS

Spectrum Internet Assist

Ongoing offer from Spectrum despite COVID-19 Pandemic (\$18/month)



SPECTRUM INTERNET® ASSIST

Affordable, reliable high-speed Internet access for qualifying households



Spectrum Internet Assist is a low-cost, high-speed broadband service that provides qualifying households with Internet service for **\$17.99 per month**.

To qualify for Spectrum Internet Assist, a member of the household must be a recipient of one of the following programs:

- The National School Lunch Program (NSLP); free or reduced-cost lunch
 - The Community Eligibility Provision (CEP) of the NSLP
 - Supplemental Security Income (SSI) (age 65 and over only)
- Programs that do not qualify for Spectrum Internet Assist: Social Security Disability (SSD), Social Security Disability Insurance (SSDI), and Social Security Retirement and Survivor Benefits are different from Supplemental Security Income (SSI) and do not meet eligibility requirements.*

If you believe you may qualify, visit SpectrumInternetAssist.com.

- Enter in your 5-digit ZIP code to see if Spectrum Internet Assist is available in your area.
- If available, you will receive direction to call 1-844-525-1574 to start the qualification process.
- If Spectrum Internet Assist is not available in your area, you will receive a coming-soon message and be asked to check back for updates.

GET CONNECTED WITH HIGH-SPEED INTERNET FOR \$17.99/MO

Spectrum Internet Assist gives your household a reliable, blazing-fast connection to the world of information, education, entertainment and services that are available online.

With Spectrum Internet Assist, you'll enjoy:

- 30 Mbps of Internet speed with NO data caps
- **FREE** Internet modem
- No contracts, ever
- Add fast in-home WiFi for \$5 more a month

To get started, visit:
SpectrumInternetAssist.com

SPECTRUM INTERNET ASSIST: Limited time offer; subject to change; not transferable. Availability of offer based on eligibility and service address that has been pre-qualified. Offer will be available to residential customers who (i) have not subscribed to Charter Communications' Internet services within 30 days prior to requesting services under this offer, (ii) have no outstanding debt for any of Charter Communications' services that was incurred within 1 year prior to requesting services under this offer and (iii) have no outstanding debt to Charter Communications that was incurred for services provided under this offer and that are subject to Charter Communications' standard debt collection procedures. Equipment, fees, taxes and surcharges may be added and subject to change during and after the term; installation and additional services are extra. Available Internet speeds may vary by address. Download speeds are up to 30 Mbps and upload speeds are up to 3 Mbps. ISP. Equipment, activation and installation fees may apply. Services subject to all applicable service terms and conditions, subject to change. Services not available in all areas. Restrictions apply. ©2022 Charter Communications.

Affordable Connectivity Program

Federal Program Providing Relief to Qualified Persons. Credit up to \$30/month or \$75/month in Tribal Lands.

The Affordable Connectivity Program



Stay connected and save up to \$30/mo.* on your Internet service.

Great news! You may be eligible to receive high-speed Internet service at no cost* from Spectrum through the Affordable Connectivity Program (ACP).

This program was created to ensure eligible households like yours will have the services you need.

The need for fast, reliable Internet is more critical than ever and Spectrum is committed to bringing you the best speeds available. Find out if you are eligible for this great program and start enjoying fast Internet speeds. We look forward to welcoming you as a Spectrum Internet® customer.

QUALIFYING GROUPS:

- Lifeline eligible*
- Free or reduced school lunch or breakfast eligible
- Pell Grant recipient
- Veterans Pension and Survivors Benefit

SPECTRUM INTERNET®

\$0 /mo*



HIGH-SPEED INTERNET AT NO COST*

Depending on level of Spectrum Internet service. Benefit expires upon termination of ACP.

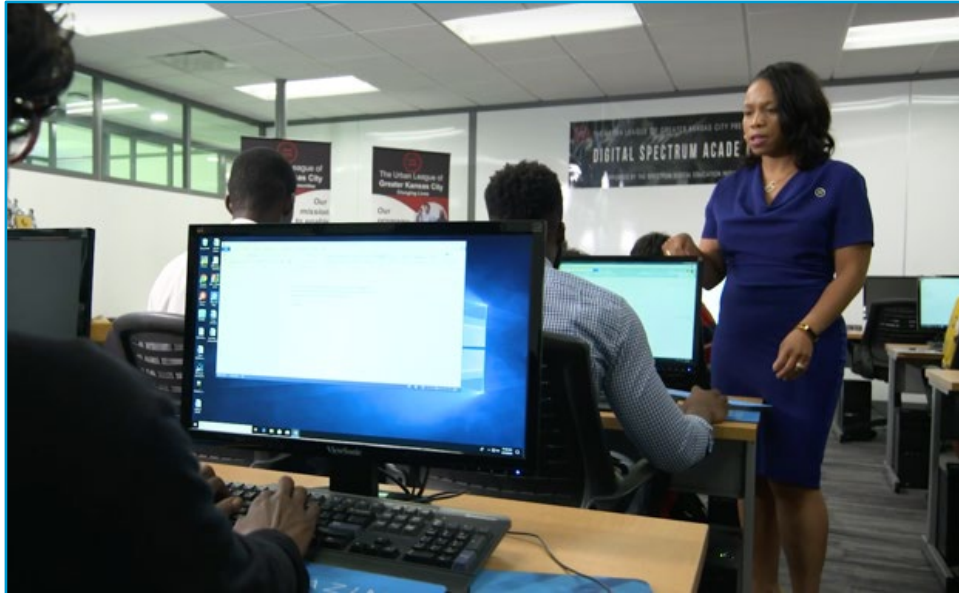
We've made it easy to find out if you qualify:

- STEP 1: CONFIRM QUALIFICATION**
Your household may qualify for the Affordable Connectivity Program. Visit www.acpbenefit.org to find out more.
- STEP 2: REDEEM YOUR SAVINGS WITH SPECTRUM**
Call Spectrum at 1-833-660-0447 or visit Spectrum.com/ACP to sign up for high-speed Internet and save up to \$30 a month if you qualify.
If you are a current Spectrum Internet customer call 1-833-660-0447 to save up to \$30/mo. on your service.
- STEP 3: ENJOY FAST INTERNET**
Surf and stream with your Spectrum high-speed Internet service and home WiFi. A temporary monthly credit will be applied to your account.



*Affordable Connectivity Program (ACP): Program benefit limited to one per household; Limited time offer; benefit expires upon FCC's termination of the Program. Income eligibility requirements apply. A recurring credit of up to \$30/mo (\$75 in Tribal Lands) will be applied directly to eligible customers' accounts; customers are responsible for charges over \$30/mo. Standard rates apply following end of the Program period; may vary by location. Taxes and fees extra depending on the area and subject to change during and after the Program period; installation/network activation, equipment and additional services are extra. Services subject to all applicable service terms and conditions, subject to change. Services not available in all areas. Restrictions apply. Programs that meet the Lifeline requirement are Medicaid, SNAP, SSI, Federal Public Housing Authority (FPHA) support and Veterans and Survivor's Pension benefit. Alternative Verification Process also eligible to qualify.
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SUPPORTING ADOPTION INITIATIVES



2021-2022 Spectrum Digital Education Grants in South Carolina!

- \$35,000 Grant to Palmetto Care Connections
- \$12,000 Grant to Communities in Schools SC

"Palmetto Care Connections is honored to receive this Spectrum Digital Education Grant to help close the digital divide for senior citizens, especially during times like these, as we work to reduce social isolation and when the need for virtual access to health care providers is so great," said Kathy Schwarting, Palmetto Care Connections chief executive officer.

Source: The Times and Democrat https://thetandd.com/news/local/article_586b3eda-a7dc-518a-b442-e6ed2cf2d359.html

As part of its five-year, \$7 million commitment to support digital literacy, Charter this year awarded \$1 million in Spectrum Digital Education Grants to 49 nonprofits across the country.



LAUNCHING – SPECTRUM COMMUNITY ASSIST



Job Skills Training



Physical Improvements



Broadband Connectivity



In-Kind Contributions

Spectrum Community Assist is heading to the Midlands & Upstate, South Carolina in 2022!

Charter Launched Spectrum Community Assist in the Fall of 2021

- **Spectrum Community Assist**, is a new philanthropic program to improve the physical condition of community centers in **underserved rural and urban communities**.
- Charter will offer in-depth partnerships with 100 community organizations to carry out the physical improvements, supported by Charter employee volunteers.
- In addition, philanthropic investments will support new or existing job skills programs offered in these centers.

Program Goals:

100

COMMUNITY CENTERS
IMPROVED BY 2025

50,000

PEOPLE SERVED BY COMMUNITY
CENTERS BY 2025

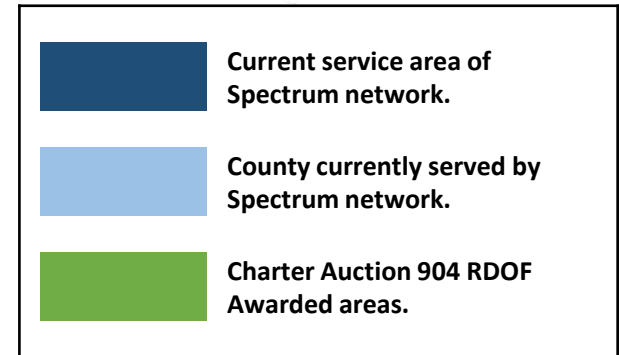
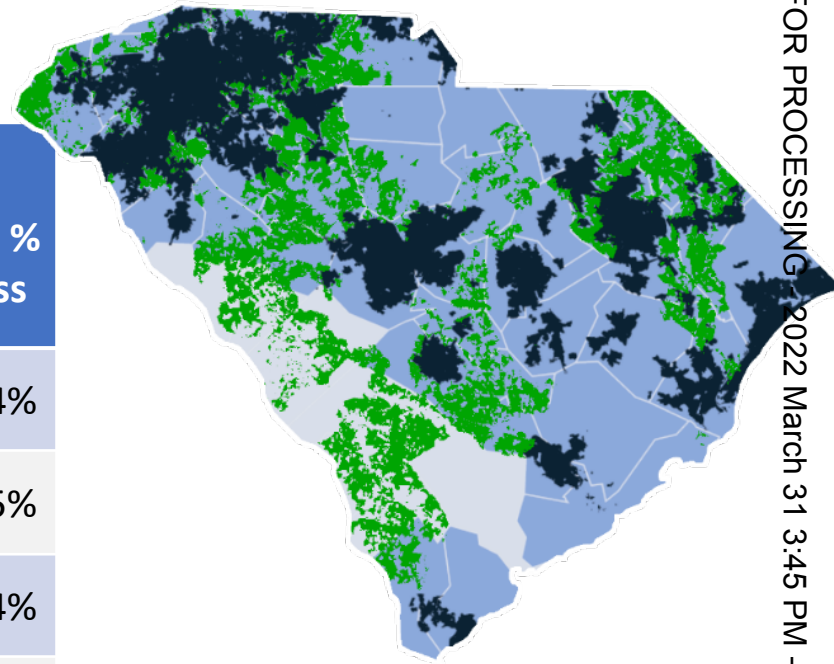
Solutions to Address South Carolina's Connectivity Challenges



SOUTH CAROLINA CAN BE FIRST TO CLOSE THE ACCESS GAP

State	Population	FCC Est. Population without Access	FCC Est. Population % with Access
Georgia	10.6 Million	654,000	~94%
North Carolina	10.4 Million	472,000	~95%
Virginia	8.5 Million	498,000	~94%
Tennessee	6.8 Million	433,000	~94%
South Carolina	5 Million	451,000	~91%

[Source: Fourteenth Broadband Deployment Report | Federal Communications Commission \(fcc.gov\)](#)



INVESTING IN BROADBAND: FEDERAL RESOURCES

Examples of Federal One Time Funds Available in Southeast States

State	State ARPA	County ARPA	Muni ARPA
AL	\$2,120,279,417	\$952,386,209	\$430,650,620
FL	\$8,816,581,383	\$4,171,798,633	\$1,517,703,957
GA	\$4,853,535,459	\$2,072,390,644	\$576,059,064
KY	\$2,183,237,290	\$867,793,106	\$395,397,702
MD	\$3,717,212,336	\$1,174,302,468	\$619,195,908
NC	\$5,439,309,692	\$2,037,187,362	\$668,167,686
SC	\$2,499,067,328	\$1,000,077,338	\$191,161,056
TN	\$3,725,832,113	\$1,326,486,991	\$516,849,109
VA	\$4,293,727,162	\$1,657,924,506	\$618,276,089
TOTAL	\$37,648,782,180	\$15,260,347,257	\$5,533,461,191

Source: <https://home.treasury.gov/policy-issues/coronavirus/assistance-for-state-local-and-tribal-governments/state-and-local-fiscal-recovery-funds>

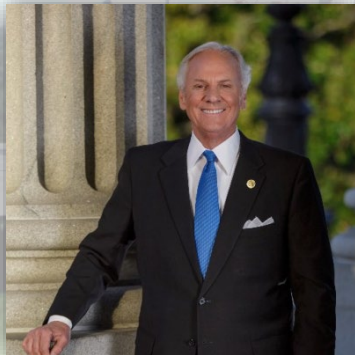
SOUTH CAROLINA'S BROADBAND ACCESSIBILITY ACT OF 2020 (BBA)

LEGISLATIVE OBJECTIVES

"It is the public policy of this State to ***promote the efficient deployment of broadband*** facilities in the State." S.C. Code Ann. 58-9-3000(7)

"The provisions of [the BBA] are reasonably related to the legislative objective of ***facilitating access to broadband services in unserved areas*** throughout the State." S.C. Code Ann. 58-9-3000(9).

Source: [Broadband Accessibility Act, S.C. Code Ann. 58-9-3000, et seq.](#)



"Broadband connectivity is a powerful catalyst for economic and social advancement. It is no longer a luxury – it is a necessity, critical to ensuring a level playing field for those in rural areas." [Source: S.C. Executive Budget Summary, FY 2020-21, at page 24](#)



LEGISLATIVE METHODS

Non-Discriminatory Access. Pole owners must provide non-discriminatory access to poles that may only be denied in certain limited circumstances. S.C. Code Ann. 58-9-3030(A)(1), (B)(2).

Just and Reasonable Rates, Terms, and Conditions. Pole owners must offer just, reasonable, and non-discriminatory rates, fees, charges, terms, and conditions for pole attachments. S.C. Code Ann. 58-9-3030(A)(1).

FCC Make-Ready Timelines and Requirements. Make-ready activities must be completed within the timeframes and other make-ready requirements set forth in [47 C.F.R. 1.1411](#). S.C. Code Ann. 58-9-3030(B)(1).

Uniform Pole Attachment Standards. Pole owners and attachers must work together to comply with the National Electric Safety Code. S.C. Code Ann. 58-9-3030(D)(2).

Commission Adjudication of Pole Attachment Disputes. The Commission is given the authority and jurisdiction to expeditiously adjudicate pole attachment disputes. S.C. Code Ann. 58-9-3030(A)(2) and (F).

Source: [Broadband Accessibility Act, S.C. Code Ann. 58-9-3000, et seq.](#)

THREE CRITICAL LINES OF EFFORT TOWARD RAPID DEPLOYMENT



The Act is designed with **efficiency** and **rapidity** of broadband deployment in mind!

Rapid Pole Attachment Dispute Resolution.

- **220 days** from required negotiations (60 days) to Commission adjudication (180 days) for new attachment disputes. S.C. Code Ann. 58-9-3030(A)(2).
- **135+ days** from ORS investigation/mediation (45+ days) to Commission adjudication (90 days) for general disputes. S.C. Code Ann. 33-49-150(B).

Uniform NESC Standards for Pole Attachments.

- The Act provides a **single** NESC standard for pole attachments. S.C. Code Ann. 58-9-3030(D)(2).
- Avoids delays that come with having to navigate a “patchwork quilt” of standards.

FCC Make-Ready Timelines & Requirements.

- About **85 days** from application to make-ready complete for many attachments. [Source: 47 CFR 1.1411\(c\)\(1\)-\(2\), \(e\).](#)
- The BBA incorporates 47 C.F.R. 1.1411 that was amended by the FCC in 2018 ([source: 33 FCC Rcd 7705](#)) for the express purpose of reducing time and expense for pole attachments. S.C. Code Ann. 58-9-3030(B)(1).

[Source: Broadband Accessibility Act, S.C. Code Ann. 58-9-3000, et seq.](#)

INVESTING IN BROADBAND: FEDERAL RESOURCES

Examples of Federal One Time Funds Available in Southeast States

State	State Broadband Program/Administrator	Total Fund	FCC Estimate of Population Without Broadband Access
AL	AL Broadband Accessibility Fund (ADECA)	\$25 Million	608,000
FL	FL Broadband Opportunity Program (FDEO)	<i>\$400 Million</i>	804,000
GA	GA Broadband Program (GADCA)	\$300 Million	654,000
KY	KY Broadband Deployment Fund (KIA)	\$300 Million	257,000
MD	MD Expansion of Existing Broadband Networks Funding Program (MDDHCD)	\$400 Million	152,000
NC	NC GREAT Grant (NCDIT-BIO)	\$967 Million	472,000
TN	TN Broadband Accessibility Grant Program (TNECD)	\$500 Million	433,000
SC	SC Broadband Infrastructure Program (SCORS)	Potential \$400 Million	450,000
VA	VA Telecommunications Initiative (VADHCD)	\$700 Million	498,000

*Blue denotes anticipated funding

Ready to Move Forward Together

Charter
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BUILDING INFRASTRUCTURE & INVESTING IN TECHNOLOGY

- ▶ In the coming months we will **develop our deployment plans** that will reflect extending our network from our existing footprint in various areas
- ▶ Field walkouts & network planning is already in progress
Charter is required to service all homes in the awarded census block groups.
- ▶ As we prepare our deployment plans our **goal is to perform outreach to all impacted government permitting agencies and pole owners**
- ▶ The timely execution depends on building **effective working relationships with all pole owners and municipal, county and state agencies**
- ▶ **Network construction is dependent on many external factors** such as, pole attachment agreements, pole applications, make-ready construction and underground permitting

Over the past 5 years,
Charter has invested nearly

**\$40
BILLION**

in American Infrastructure
and Technology.

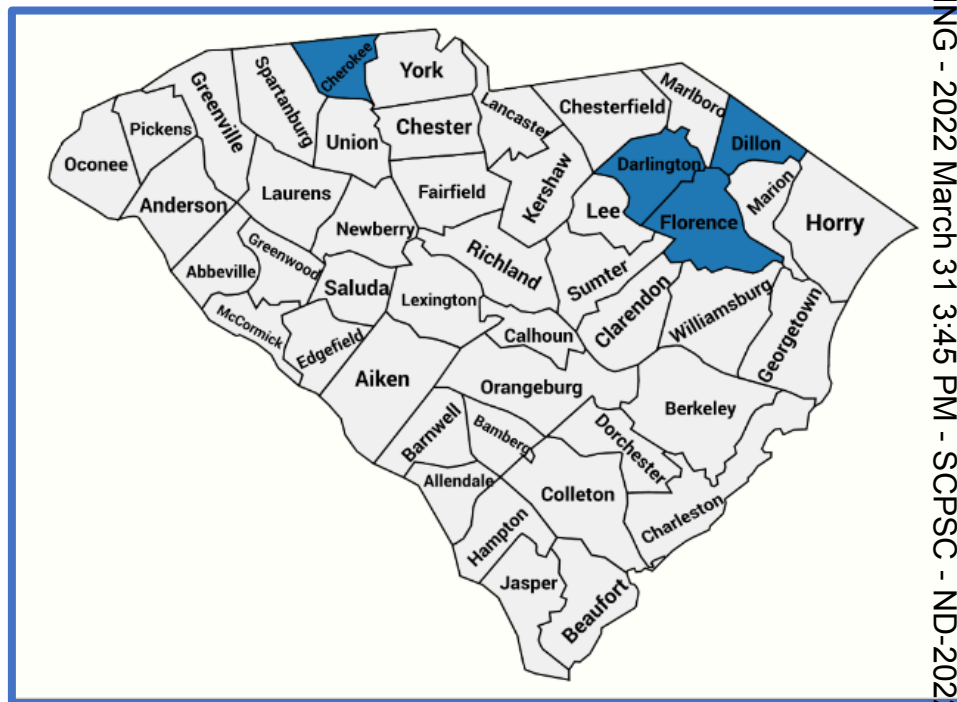
2016-2020

CLOSING THE DIGITAL DIVIDE: EXPANDING CONNECTIVITY

Local Solutions through Public Private Partnerships in South Carolina

Charter Communications has entered into 4 public-private partnerships with the following counties for rural broadband projects funded by Charter's private investment and county American Rescue Plan funds:

- Florence County
- Cherokee County
- Darlington County
- Dillon County



CLOSING THE DIGITAL DIVIDE: EXPANDING CONNECTIVITY

[Florence County and Charter Communications partnering to bring broadband to whole county](#)
SCNow (9/23/2021) Matthew Christian

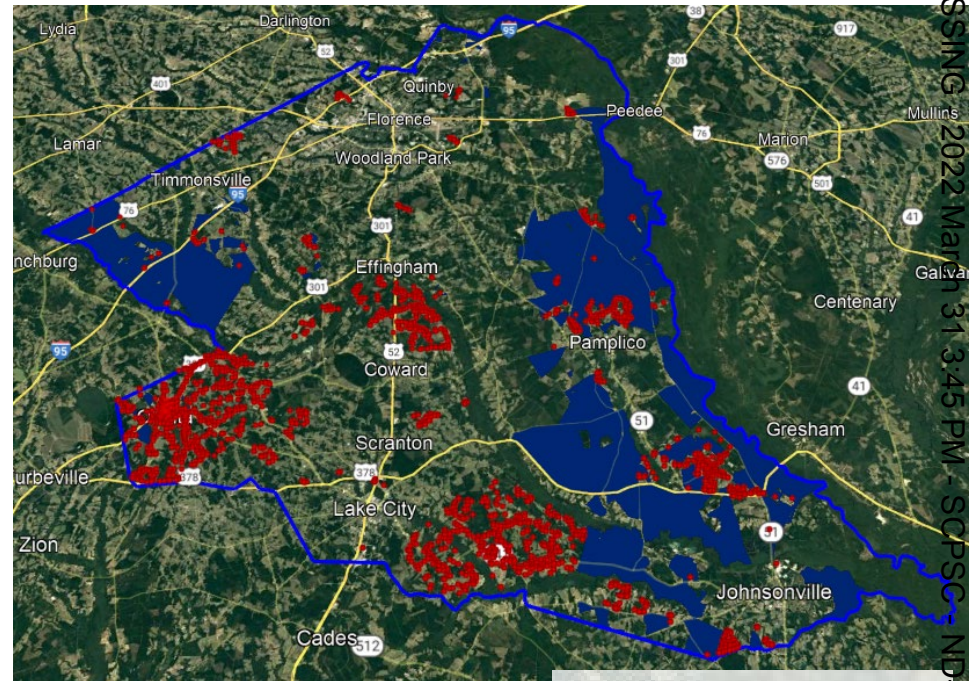
The Florence County Council recently voted unanimously to approve a contract with Spectrum Southeast LLC, a Charter subsidiary, to provide broadband to approximately 3,320 addresses in the county by the beginning of 2024.

Florence County will provide \$4.5 million of its American Rescue Plan funds for the \$13.8 million project. Spectrum Southeast, the Charter subsidiary, will provide the remaining \$9.3 million.

Rusty Smith, Florence County administrator, told the council that the project is part of a larger \$20 million effort from the company to connect the remainder of the county to broadband.

"I feel certain that this will expand our information highway exponentially," Smith said at a recent meeting.

Willard Dorriety Jr., Florence County Council chairman, said he hoped this would make Florence the first in the state with comprehensive broadband.



Legend

- Additional Unserved
- Charter RDOF

Thank You

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